

Germany Market Profile

This summary provides the most up-to-date data available on Germany as it relates to their people and economy, travel related motivations and planning behavior and German visitor profile specific to Arizona.

GENERAL COUNTRY PROFILE

POPULATION:
80.7 million

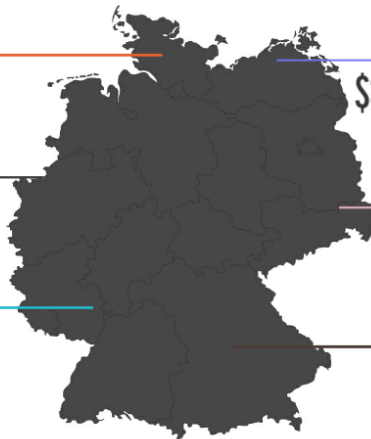
INFLATION RATE:
0.4%

EXCHANGE RATES (EUR PER USD):
0.921

GROSS DOMESTIC PRODUCT (GDP):
\$3.98 trillion (1.7% annual growth rate)

EXPORTS:
\$1.8 trillion

UNEMPLOYMENT RATE:
4.3%



Source:
The World Fact Book, reporting 2016 data

TRAVEL MOTIVATION AND PLANNING



Top Travel Motivators

42% Cultural Historical Attractions

40% Shopping

38% Dining/ Gastronomy



Source used in Destination selection for last leisure trip

60% Websites via computer or laptop

45% Recommendation from family & friends

37% Information in printed travel guidebooks

27% Advice from travel professionals/travel agents



Advance Decision Time

20% Less than a month

14% 1 to 2 months

34% 3 to 5 months

25% 6 to 12 months

7% More than 1 year



Lodging Reservation made before leaving home

76% Yes

40% Internet Booking Service*

21% The Lodging Establishment Directly

33% Travel Agency/Tour Operator/Travel Club

4% Other

24% No

* assume "Internet Booking Service" is an Online Travel Agency (OTA).



How Air Reservations were Booked

30% Directly with Airline

47% Travel Agency/Tour Operator/Travel Club

23% Internet Booking Service*

5% Corporate Travel Department

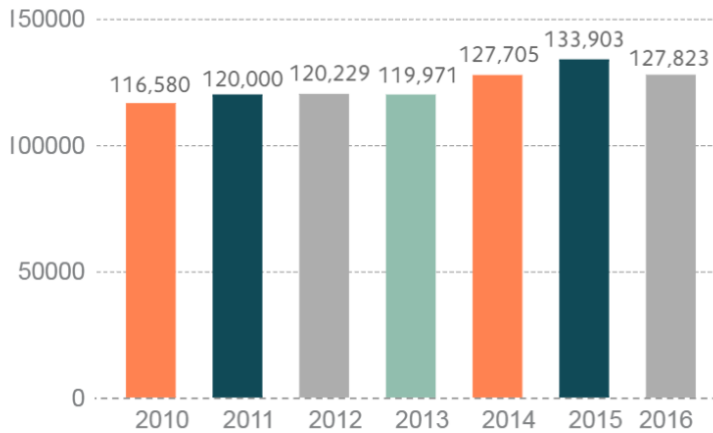
* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:
Brand USA, reporting 2014 data
U.S. Dept. of Commerce - NTTO, reporting 2014-16 data

GERMAN VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

40 years

Average Age

\$102,455

Average Household Income

2.0 persons

Average Party Size



Length of Stay

5.2

Nights per Destination

25.8

Nights in U.S.



Port of Entry

30% Los Angeles, CA

19% San Francisco, CA

8% Las Vegas, NV

7.5% Chicago, IL

5% New York, NY



Main Purpose of Trip

95% Leisure

83% Vacation Holiday

7.4% Visit Friends/Relatives

3% Education

7.7% Business

3.7% General Business

2.6% Convention/Conference/Trade Show

* includes trips with multiple purposes



Transportation in U.S.

75% Rented Auto

39% Air Travel between U.S. Cities

34% City Subway/Tram/Bus

22% Auto, private or company

19% Taxicab/Limousine



Accommodations*

72% Hotel/Motel

17% Private Home

17% Other



Visa Credit Card Travel Spending

German Visa Card Spending ranked #5 in 2016 with 2.6% of total International Travel Spending in Arizona.

By Quarter



Q1: 15%
Q2: 29%
Q3: 38%
Q4: 19%

By Arizona Region



Northern: 42%
Phoenix & Central: 37%
West Coast: 9%
Tucson & Southern: 7%
North Central: 5%

* since this is collected through a survey, there is no indication if this is paid or non-paid.

Source:

Tourism Economics, reporting 2010-2016 data

VisaVUE Travel, reporting 2016 data

U.S. Dept. of Commerce - NTTO, reporting 2014-16 aggregate data